

Tax Prep Checklist

Everything to gather before your appointment, so we can prepare an accurate return the first time.

PERSONAL INFORMATION

- ☐ Government-issued photo ID (yours, and spouse's if filing jointly)
- ☐ Social Security cards or ITIN letters for you, your spouse, and any dependents
- ☐ Prior year tax return (if new client)
- ☐ Direct deposit info for your refund (bank routing & account number)

INCOME DOCUMENTS

- ☐ W-2 forms from all employers
- ☐ 1099-NEC / 1099-MISC (self-employment or contract income)
- ☐ 1099-INT / 1099-DIV (interest and dividend income)
- ☐ 1099-B (stock or investment sales)
- ☐ 1099-R (retirement account distributions)
- ☐ 1099-G (unemployment income or state refund)
- ☐ K-1 forms (partnership, S-corp, or trust income)
- ☐ Rental income and expense records (Schedule E)
- ☐ Records of any cryptocurrency transactions

SELF-EMPLOYED & BUSINESS OWNERS

- ☐ Profit & loss statement or income/expense summary
- ☐ Business mileage log
- ☐ Home office measurements (if claiming home office deduction)
- ☐ Records of estimated tax payments made during the year
- ☐ Business asset purchases (equipment, vehicles, etc.)

DEDUCTIONS & CREDITS

- ☐ Mortgage interest statement (Form 1098)
- ☐ Property tax records
- ☐ Charitable donation receipts
- ☐ Childcare provider name, address, and Tax ID (for dependent care credit)

- ☐ Education expenses (Form 1098-T, student loan interest Form 1098-E)
- ☐ Medical expenses (if itemizing)
- ☐ IRA or HSA contribution records

INTERNATIONAL & NON-RESIDENT CLIENTS

- ☐ Visa type and dates of U.S. entry/exit
- ☐ Foreign income statements and any foreign tax paid
- ☐ U.S. rental property records (if applicable, for FIRPTA purposes)
- ☐ ITIN application documents (if you don't yet have an ITIN)

Not sure if something applies to you? Bring it anyway — it's easier to set aside a document we don't need than to track one down after the fact.

The Fiscal Star · Arita Sheremeti, IRS Enrolled Agent · Miami Beach, FL
arita.sheremeti@gmail.com · thefiscalstar.com